

# 3(16) FIDUCIARY PARTNER PROGRAM

Managing the day-to-day operation of a retirement plan can be complicated and time consuming. With over 25 years of retirement plan administrative experience, [The Retirement Plan Company \(TRPC\)](#) has the expertise to act as a co-fiduciary and reduce your fiduciary responsibilities and potential liability. Our team of CPAs, administrators, and actuarial professionals take these burdens off your plate. We focus on the administration of your plan, so you can focus on your business.



## Employee Notification Services:

TRPC will coordinate the delivery of the following employee notifications and disclosures (if applicable):

- Fee Disclosures
- Summary Annual Reports
- Safe Harbor Notices
- Automatic Enrollment Notices
- Summary Plan Description
- Summary of Material Modifications
- Ad Hoc Communications
- Tracking of Notices Sent
- Updating Participant Contact Info as Needed

## Distribution Services Provided:

- Authorize Loans
- Authorize Termination Distributions
- Authorize In-Service Withdrawals
- Authorize Hardship Withdrawals
- Authorize Required Minimum Distributions
- Authorize Corrective Refunds
- Authorize Qualified Domestic Relations Orders (QDROs)

## 5500 Execution Services:

- Sign & File Form 5500
- Sign & File Form 8955-SSA, as applicable

## Employee Notification Services: (optional)

Participants	Base Fee	Electronic Delivery Fee	Paper Delivery Fee
0-99	\$500	\$1 per participant	\$5 per participant
100+	\$750	\$1 per participant	\$5 per participant

## Distribution Processing (optional)

**Distributions**  
Termination, Hardship, RMDs,  
QDROs, etc

\$25 per distribution

**Loans**

\$50 per loan

## Other Services (optional)

**5500  
Execution**

\$300 for plans  
with less than 100  
participants

Ask for a quote for larger plans

Additional services may be quoted upon request. Additional fees may apply for postage, copying, printing, and other functions. These fees will be at cost plus 10%. 3(16) Fiduciary Partner Program fees are in addition to the standard TRPC plan administration fees.

## About TRPC

The Retirement Plan Company, LLC (TRPC) is a proud Partner Firm of U.S. Retirement & Benefits Partners®, an independent national financial services firm specializing in employee benefit plans and retirement savings programs for corporate, not-for-profit, public school, and governmental employers. TRPC specializes in 401(k), 403(b), 457 and Defined Benefit Cash Balance plan programs.

Headquartered in Nashville and with regional offices in Lakeland, Florida and Miami, Florida, our success in serving retirement plans from coast-to-coast is made possible by the relationships that we have with some of the nation's most trusted and experienced financial advisors, TPA firms, and investment platform providers.

www.trpcweb.com  
888.673.5440 opt. 4  
trpc\_sales@trpcweb.com

**For Invoice (Fee) Payments ONLY**  
5200 Maryland Way  
Suite 310  
Brentwood, TN 37027

**For All Other Correspondence**  
Only My Plan Admin  
PO Box 50  
Lakeland, FL 33802-0050

**Overnight Deliveries**  
My Plan Admin 2855  
Interstate Drive Suite 115  
Lakeland, FL 33805